

Importing Data Into New Fields

Apricot Targeted Webinar

Meet Your Trainer

Megan Dodds

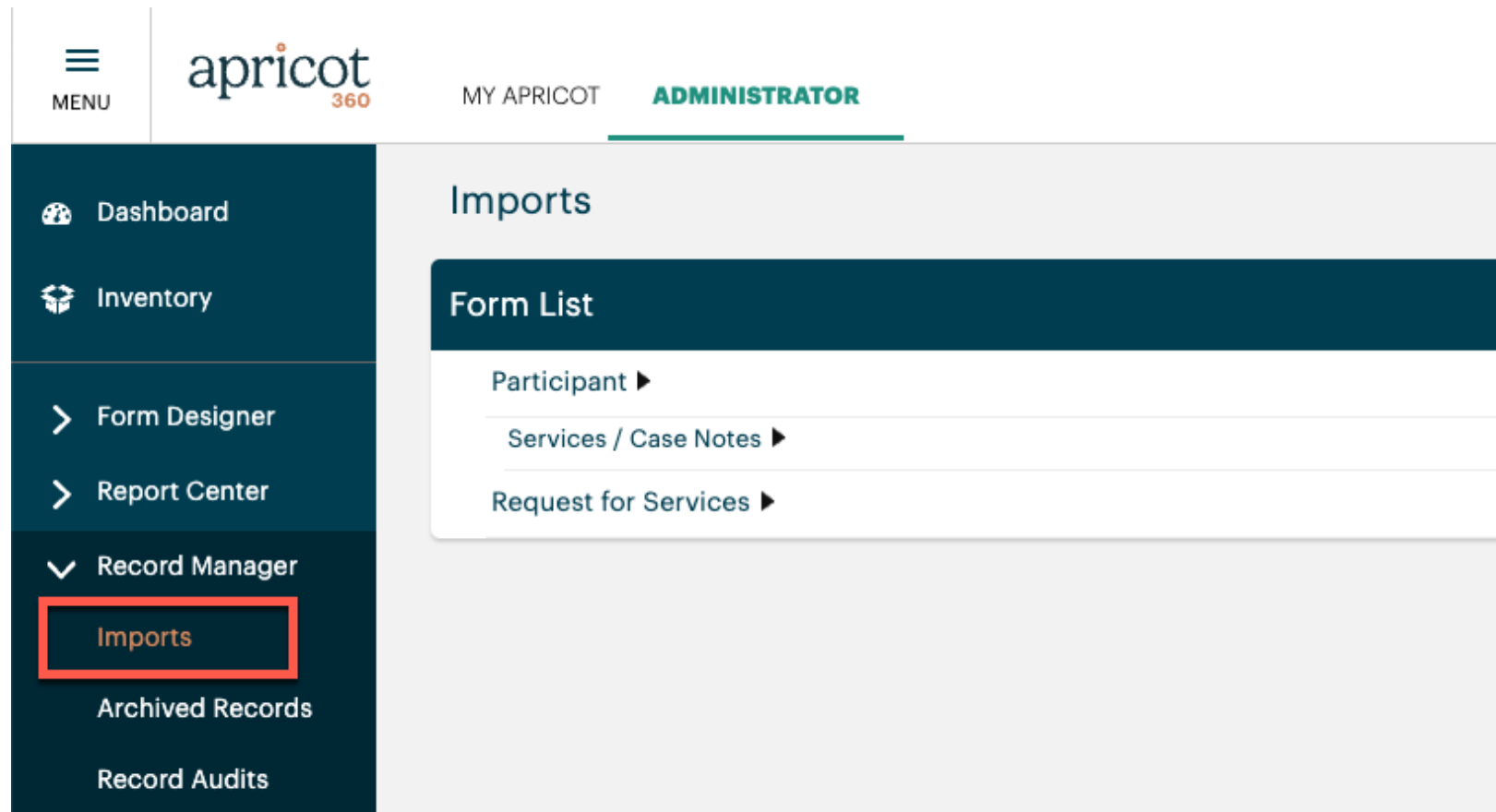
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Learning Objective

This training will cover the process of preparing for and importing your data into a new field in Apricot.



The screenshot displays the Apricot 360 Administrator interface. The top navigation bar includes a 'MENU' icon, the 'apricot 360' logo, and the user role 'ADMINISTRATOR'. The left sidebar contains a list of menu items: Dashboard, Inventory, Form Designer, Report Center, Record Manager, Imports (highlighted with a red box), Archived Records, and Record Audits. The main content area is titled 'Imports' and features a 'Form List' section with three items: Participant, Services / Case Notes, and Request for Services, each with a right-pointing arrow.

Agenda

Preparing for Import

Importing Data

Using the Import Tool

Preparing for & Importing Data

Prepare for Import

- Open “Imports” from the Record Manager on the Administrator side of Apricot
- Select “Prepare for Import” and choose the correct Form
 - Import Type = Data
 - Record Action = Update Existing
 - Reconcile Records Using = Record IDs
 - Column Selection = **uncheck ALL** but Record ID and your new field
- Download CSV file

Prepare for Import

Import Configuration

Form
Request for Services

Import Type
 Data
 Linking

Options
 Enforce All Required Fields

Record Action
 Create New
 Update Existing
 Both


Reconcile Request for Services Records Using
 Record IDs
 Duplicate Check Fields

Import Actions ▾
Download CSV File
Print Instructions
Return to Imports

Transfer Data Using Report

- Open the Exported Report file
- Copy and paste the data from the Report (Record ID & original field columns) into the CSV
 - The Record IDs will align
 - Data from the original question will now go under the new question column in the CSV file
- Save the CSV

	A	B	C	D		A	B	C	D
1	Record ID	I am interested in services for:			1	System	field_2747	field_3003	
2	2605	Myself			2	{	Request for Services - Record ID	*I am interested in services for	
3	2606	Myself			3		2605	Myself	
4					4		2606	Myself	
5					5				
6					6				
7					7				



Report Export – Excel file

Import – CSV file

Enter Data Into CSV

- Open the CSV file
- Enter the new data into the corresponding columns – ensure the Record ID is accurate so Apricot knows which participant this record should be tied to
- Save the CSV

	A	B	C	D	E	F	G	H	I
1	System	field_2084	field_2241	field_2329	field_2330	field_2242	field_2249		
2	{	Participant - Record ID	*Date of Class	*Class Start Time	*Class End Time	*Attendance Status	Assigned Programs		
3		65	May 9th	12:00	1:30	Present	Financial Literacy		
4		83	May 9th	12:00	1:30	Absent	Financial Literacy		
5		26	May 9th	12:00	1:30	Present	Financial Literacy		
6		63	May 9th	12:00	1:30	Present	Financial Literacy		
7		135	May 9th	12:00	1:30	Present	Financial Literacy		
8									

Import Data

- Navigate back to main Imports page
- Select “Upload File” from Import Actions on the right
- Select CSV from saved files and select “Upload” from Import Actions on the right
- Select Run All to complete the Import

Import Progress ▼

Queued

Uploaded



Assigned



Verified



Prepared



Validated



Reconciled



Imported



Reverted

Archived

Last Changed

05/08/2024 1:57 PM CDT

Megan Dodds

Additional Resources

Additional Training Opportunities

- [Knowledge Base](#) – How-To Articles (Search Chat or Visit Online)
- [Bonterra Academy](#) – Free Webinars & Recordings
- [Foundations](#) – Intensive, Multiday Courses to Cover Admin Basics
- [Admin Labs](#) – 2 Hour Live Trainings on Specific Capabilities
- [Private Training](#) – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)

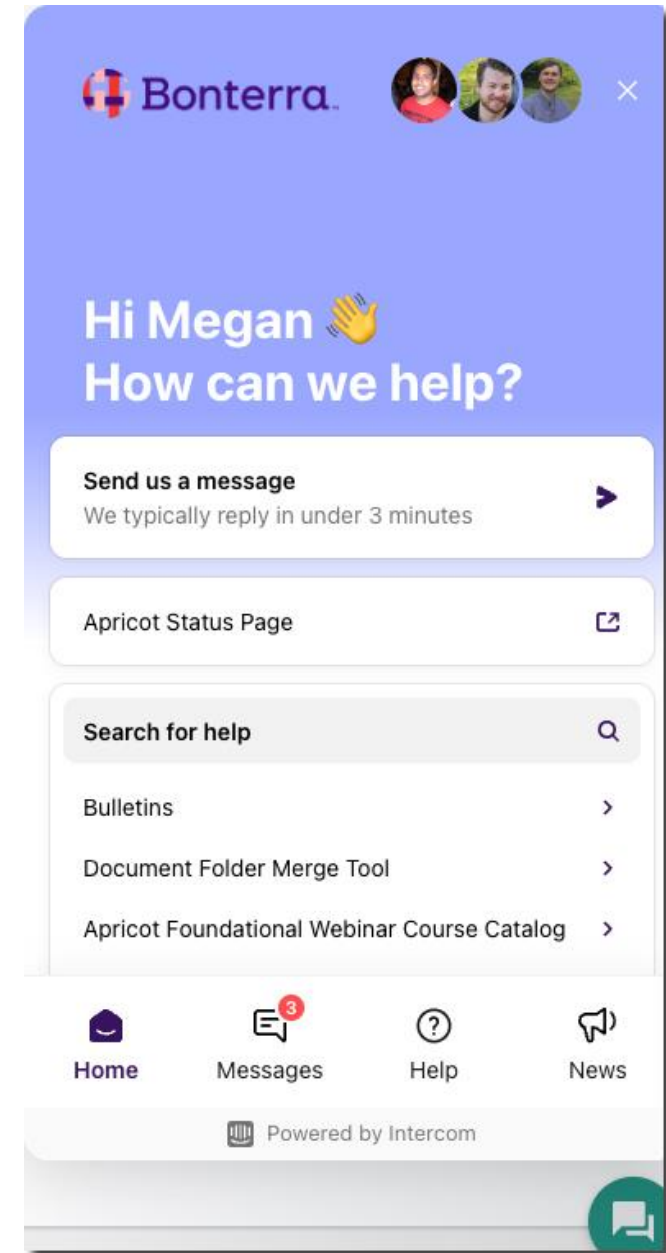


Build confidence & knowledge in
our software!

Customer Support

Reach out to our Customer Support Team with Questions or Concerns.

Weekdays 7am – 7pm CST via chat or through email:
apricot@bonterratech.com



Q & A

- Ask questions about functionality covered in this training
- Ask trainer to redo a demo
- Ask real-life application questions
- Or sign off and we will see you in the next training!



Thank you for attending!

We hope to see you
in future trainings.